

Message Text

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SUBJECT: REQUEST FOR ASSESSMENT

REF: STATE 304403, SEOUL 4936, SEOUL 9925, SEOUL A-135

SUMMARY. DENIAL TO ROK FISHING FLEET OF ACCESS TO SOVIET FLEET WILL HAVE RUINIOUS ECONOMIC CONSEQUENCE ON KOREAN FISHING INDUSTRY, WILL REDUCE FURTHER ALREADY SUB-STANDARD PROTEIN INTAKE LEVEL AND COULD HAVE MAJOR ADVERSE IMPACT ON U.S. FROZEN AND FAST FOOD INDUSTRIES. END SUMMARY.

1. THE ROK FISHING INDUSTRY ROSE (WITH USAID ENCOURAGEMENT AND SUPPORT) FROM WARTIME DESTRUCTION ONLY TO FIND IT WAS EXCLUDED FROM VALUABLE SPECIES SUCH AS SALMON AND CONTINENTAL SHELF RESOURCES. IT WAS ALLOWED TO CATCH AND DEVELOP MARKETS FOR LESS DESIRABLE SPECIES SUCH AS ALASKA POLLACK AND BLACK COD IN WHICH AMERICAN FISHERMEN WERE NOT INTERESTED. THE ROK FISHERY INDUSTRY PROSPERED UNTIL THE "OIL SHOCK" WHICH CAUSED HARDSHIP FOR THE TRADITIONALLY POVERTY-RIDDEN FOUR PERCENT OF EMPLOYED KOREANS WHO DERIVE THEIR LIVELIHOOD FROM FISHING. 1975-76 BROUGHT SHORT-LIVED RECOVERY WHICH MAY NOW BE ENDANGERED BY THE REQUIREMENTS OF ALASKA POLLACK
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RESOURCE CONSERVATION. KOREA'S POLITICAL CIRCUMSTANCES SUGGEST THAT IT IS LIKELY TO BE EXCLUDED FROM THE SOVIET WATERS. THIS IN TURN RAISES THE PROBABILITY THAT IT WILL THEREFORE BEAR THE BURDEN OF CONSERVATION TO A DEGREE DISPROPORTIONATE TO THAT OF THE OTHER FISHING NATIONS IN THE NORTH PACIFIC.

2. STATISTICS FOR 1975, RATHER THAN THOSE FOR 1976, PROVIDE THE BASIS FOR ASSESSING THE ACTUAL EFFECTS OF THE EXCLUSION OF KOREA FROM THE KAMCHATKA FISHERY. THE DISPATCH OF THE YUSHIN HO FLEET IN 1976 TO THE U.S. AREA DISTORTED THE GEOGRAPHIC PATTERN OF PREVIOUS ROK POLLACK EFFORTS. THE TABLE BELOW INDICATES POLLACK CATCH OF KAMCHATKA:

YEAR NUMBER OF VESSELS M/T OF POLLACK CAUGHT

1973	39	223,000
1974	32	204,700
		PLUS 41,600 CAUGHT IN BERING SEA BY 23 VESSELS
1975	32	337,000
1976	29	279,000
		PLUS 143,000 CAUGHT IN BERING SEA BY 30 VESSELS

THEREFORE, EXCEPT FOR THE TWO VOYAGES OF THE YUSHIN HO IN 1974 AND 1976, VIRTUALLY ALL OF THE KOREAN ALASKA POLLACK CATCH HAS COME FROM KAMCHATKA.

3. ASSUMING THAT (A) THE KOREAN QUOTA UNDER PL-265 WOULD BE 85,000 M/T AND (B) ROK BOATS WERE EXCLUDED FROM THE KAMCHATKA FISHERY (WHICH IS WITHIN 200 MILES OF THE USSR), IT CAN BE SAID THAT THE IMMEDIATE 1977 LOSS TO KOREA WOULD BE 337,000 M/T FROM THE 1976 CATCH AND LAYING UP OF AT LEAST 32 VESSELS OUT OF THE 55 LIMITED OFFICIAL USE

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ENGAGED IN POLLACK FISHING IN 1976 (59 MINUS THE YUSHIN HO AND THREE TRANSPORTS).

4. THE 85,000 M/T OF ROUND FISH WOULD PRODUCE ABOUT 17,000 M/T OF FISH FLESH FOR HUMAN CONSUMPTION COMPARED TO APPROXIMATELY 23,200 M/T OF FISH FLESH CONSUMED DOMESTICALLY IN 1975. AN EQUIVALENT SOURCE OF 5,200 M/T OF ANIMAL PROTEIN WOULD HAVE TO BE FOUND MERELY TO MAINTAIN THE AVERAGE DAILY PER CAPITA ADULT INTAKE AT ITS PRESENT SUB-STANDARD LEVEL WHICH IS LITTLE OVER HALF THAT RECOMMENDED BY FAO. SUCH SUDDEN DISLOCATION IS DIFFICULT FOR A SMALL COUNTRY THAT IS ALREADY FOOD-SHORT. LOCAL PRICES OF POLLACK FOR NEW YEAR'S HOLIDAY HAVE ALREADY GONE UP ALMOST 100 PERCENT ON THE NEWS OF THE DECLARATION OF THE SOVIET CONSERVATION ZONE.

5. ON THE EXPORT SIDE, IT COULD BE ARGUED THAT KOREA MIGHT CONSUME THE TUNA AND OTHER SPECIES IT EXPORTS TO

THE JAPANESE AND U.S. MARKETS. THIS WOULD SERIOUSLY HAMPER U.S. CANNERIES IN WESTERN SAMOA WHICH ARE HIGHLY DEPENDENT ON KOREAN SUPPLY AND WHICH COULD NOT EASILY REPLACE THAT SOURCE. SIMILARLY, THE RECENTLY GROWING MARKET IN THE U.S. WILL BE AFFECTED BY THE REDUCTION OF CESSATION OF KOREAN SUPPLY (40,000 M/T IN 1975) OF FISH BLOCKS ON WHICH THE FROZEN AND FAST FOOD INDUSTRIES HAVE BECOME DEPENDENT. WE UNDERSTAND THAT THERE IS LITTLE SHORT-RUN POSSIBILITY OF AMERICAN FISHERMEN BEING ABLE TO SUPPLY U.S. DEMAND FOR FISHBLOCKS, SO THAT THE IMPACT OF THE KOREAN LOSS ON THE U.S. ECONOMY WILL BE IMMEDIATELY NOTICEABLE.

6. IT SHOULD BE NOTED THAT CONGRESSIONAL STAFF MEMBER STEPHEN PERLES SUGGESTED THE POSSIBILITY THAT KOREAN FILLETING/FREEZING ACTIVITY COULD CONTINUE USING IMPORTED ROUND FISH. HOWEVER, EMBASSY IS INFORMED THAT POSSIBLE PROFIT MARGINS FOR FISH BLOCKS, WHERE KOREAN VESSELS LIMITED OFFICIAL USE

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HAVE NOT CAUGHT THE FISH THEMSELVES, ARE SO SMALL THAT PRESENT SHORESIDE PROCESSING OF POLLACK FOR EXPORT WOULD NOT BE WORTHWHILE TO CONTINUE. IT SHOULD BE NOTED THAT ALL POLLACK FOR THE U.S. MARKET ARE LANDED IN KOREA, FILLETED, FROZEN INTO BLOCKS AND THEN EXPORTED. EMBASSY UNDERSTANDS THAT NO RPT NO POLLACK TAKEN BY SOVIETS IS SOLD TO U.S. AND ALL THE JAPANESE CATCH IS PROCESSED FOR DOMESTIC CONSUMPTION SINCE KAMABOKO, A FISH SAUSAGE IS NOT LIKELY TO SUIT THE AMERICAN PALATE.

7. COMMENT: EXTREME DEPENDENCE OF U.S. MARKET AND EMPLOYMENT ON THE ROK POLLACK CATCH APPEARS TO OFFER STRONG ARGUMENT FOR GIVING SOVIET NORTH PACIFIC QUOTA TO THE ROK IN THE EVENT THAT KAMCHATKA IS TO BE CLOSED TO KOREAN VESSELS. ALL OF THE FOREGOING MAY BE TREATED AS UNCLASSIFIED UPON REMOVAL OF STADIS CAPTION.
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